

Refresher Session:

Intro to Motivational Interviewing for Care Coordinators

Presented by:
Jamie Freleng, RDN



Customer Service

- **Reminder: first get into the MI Spirit**
 - Remove your “fix it hat”
 - Express empathy
 - Respect autonomy
 - Guide the patient

Engage

- **Ask Permission**
 - “I’m calling about a new benefit that’s now available to you as a Medicare member. This benefit does not affect your Medicare coverage – that hasn’t changed. **Is now a good time to talk?**”
- **Open the Dialogue**
 - *Would it be helpful if I have a quick recap of the benefit to see if you have any questions?*

Choose the Best Response:

- **Ask Permission**

- “I’m calling about a new benefit that’s now available to you as a Medicare member. This benefit does not affect your Medicare coverage – that hasn’t changed. **Is now a good time to talk?**”
- Patient: “No, now isn’t the best time. I am not at home.”

- That’s ok, it will only take a second.
- Okay— that is totally understandable, what would be a better time for me to contact you?
- I understand, thank you for your time.

Explore

- **Ask Open Ended Questions**
 - *Tell me more about the reasons you don't want to enroll at this time.*
 - *When would be the best time to follow up with you?*
 - *What can I do to support you through this process?*
 - *What do you already know about this program?*
 - *What would be some of the benefits of making time to enroll in this program?*

Choose the Best Response:

- **Patient:** *"I don't really think this is something I need right now."*
- It's totally understandable that you would feel that way. Tell me a little bit more about the reasons you feel you don't need it.
- OK, I will just call you at a later time after you have had more time to think about it.
- Are you sure you don't want to just try it and see how it goes?

Reflections

- **Simple:**

- *What I am hearing you say is...*
- *So your biggest concern is...*
- *People you trust have said (...)*
- *The 2 things you most look forward to after this is over are...*

- **Complex:**

- *You would really like some answers about the details of this program.*
- *Taking this step right now seems a bit scary for you...*
- *You find your health important and are unsure if this is the right thing for you.*

Choose the Best Response:

- **Patient:** *"I feel great and haven't had any major health issues in a long time. I have made several changes to my lifestyle already to keep me out of the hospital."*
- You should really sign up for this benefit now to prevent any health issues down the road.
- You find your health extremely important. You have made so many changes so far, and are unsure if this is something you really need right now.
- OK, I will make a note here and will follow up at a later time.

©2022 DaVita Inc. Proprietary and confidential. For internal use only.



Affirmations

- **Help with relationship building and confidence**
 - *You have thought a lot about this step.*
 - *It is important to you to stay safe and out of the hospital so you can help your family.*
 - *You like making up your own mind.*
 - *You have done quite well with all the challenges managing your health.*

Choose the Best Response:

- **Patient:** *“Yes. I decided a long time ago that I needed to make changes in order to be healthier. I want to be around to watch my grandchildren grow up.”*
- You have done quite well with all the challenges of managing your health and have made huge strides. It is important to you to keep this up to be here for your family.
- I think its important to make healthy changes.
- I understand that family is important to you.

©2022 DaVita Inc. Proprietary and confidential. For internal use only.



Partnership

- **Be a partner to your patient. Seek out their perspective on how to problem solve.**
 - *Would it be ok if we...?*
 - *With your permission, I would like to...*
 - *Whenever you are ready...*
 - *Where do we go from here?*
 - *What ideas have you come up with?*
 - *How can I help you with....?*

Choose the Best Response:

- Patient: “Yes, my health is very important to me.”
- Well, then I think you really need to reconsider and enroll in this benefits program.
- Great! Let’s go ahead and get you enrolled in this benefit today!
- Would it be ok if we talked about some experiences other patients have shared?

Sharing Experiences

- **Ask Permission**
 - *I have heard of others experiences; may I share that with you?*
- **Once patient agrees, share experiences and find out what it means to the patient**
 - *What do you make of this?*
 - *How could this information help you?*
- **Always support that patient's choice**
 - *We have covered a lot of information. What do you think you might do now?*
 - *It is really up to you about what we do next.*
 - *What do you think your next step might be?*

Example of Partnership:

- Patient: “Sure that would be fine.”
- CC: “We have heard that patient’s are actually enrolling in this program now, while they feel well, in order to maintain good health. They are using this benefit to stay healthy and be preventative. What are your thoughts about that?”
- Patient: Yes, that makes sense to me.
- CC: It is really up to you about what we do next. Where do we go from here?

Guiding a Patient Not Ready to Change

- **STEP 1: Support patient autonomy and choice.** *It is certainly your choice.*
- **STEP 2: Ask for permission.** *I'd love to hear more of your thoughts.*
- **STEP 3: Elicit the reasons for hesitancy.** *Tell me more about the reasons you aren't sure about enrolling... What else?*

[Reflect and validate; do not disagree or present alternative perspective]

- **STEP 4: Elicit the benefits.** *Tell me about the benefits if you managed to get past these reasons. What else?*
- **STEP 5: Summarize and ask what patient thinks.** *So on the one hand, you are hesitant because x, y and z; on the other hand, you see the possible benefits as a, b and c. Where does this leave you?*

Closing

- Thank you for taking the time to speak with me— I truly appreciate you sharing your perspective.
- I am always here to listen and support you.
- If you have any other questions or concerns, do not hesitate to talk with me.

CKCC Onboarding Script

Script to use when onboarding patients telephonically

Michael Smith





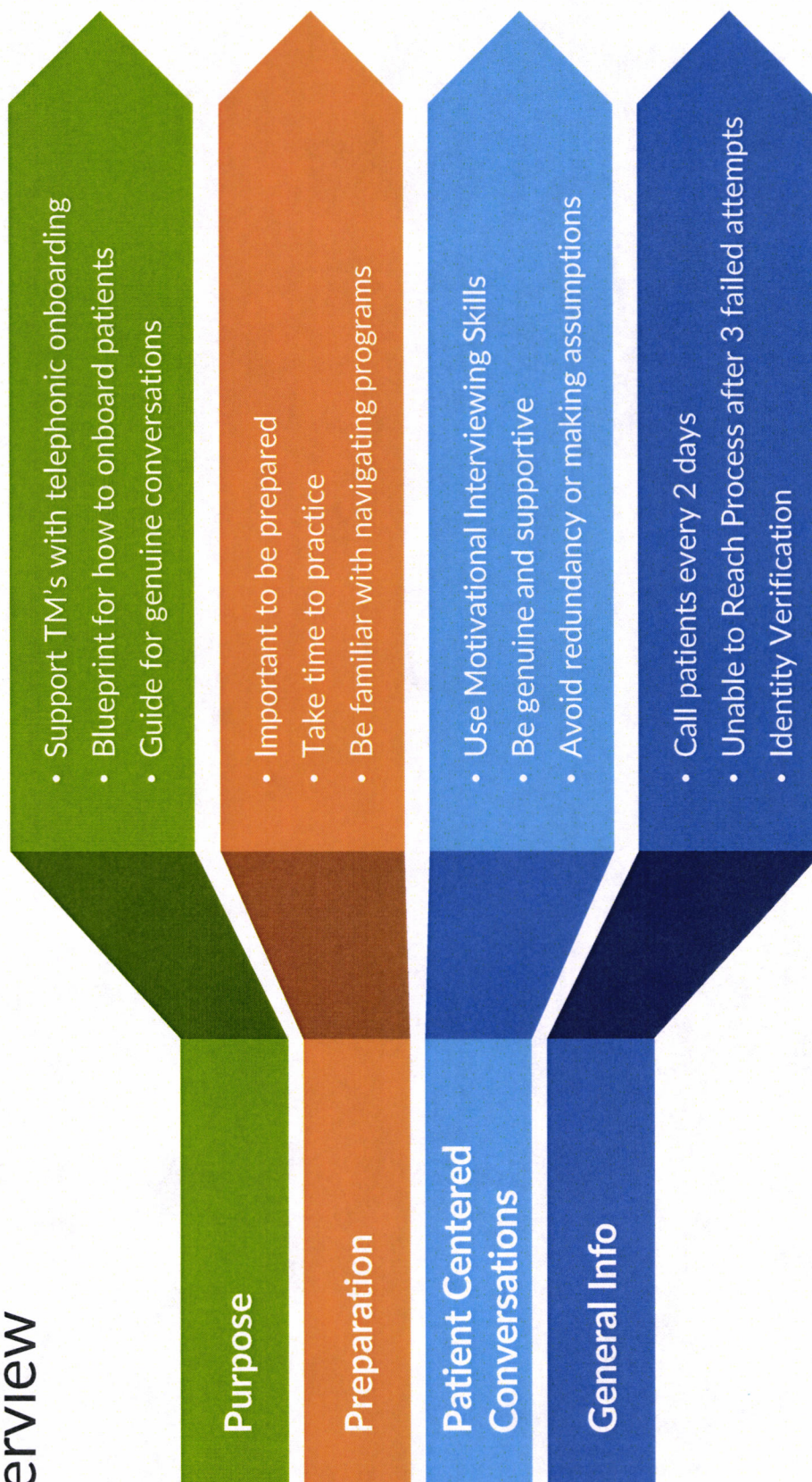
Comprehensive Kidney Care Contracting (CKCC) Program

CKCC Patient Onboarding Script

Table of Contents:

- Introduction
- Voicemail Script
- Greeting Patients
- Barrier Capture
- Call Back Scheduling
- Overview
- PAM-Patient Activation Measure
- Consents
- CHE Scheduling
 - Insurance Verification
- Wrap Up

Overview



Leaving Voicemails

Voicemail
Script for 1st
attempt to
reach a patient

Hi, this is [CC Name] from DaVita Integrated Kidney Care. I am reaching out to you to introduce a new benefit that's now available to you through your health insurance provider. This benefit will bring you a dedicated team and personalized support to help you manage all aspects of your care. Please give us a call at 1-833-820-0842 to learn more. Have a great day!

Voicemail
Script for 2nd
attempt to
reach a patient

Hi, this is [CC Name] from DaVita Integrated Kidney Care. We have been trying to reach you to ensure you receive all the benefits of the Comprehensive Kidney Care Program. We are working with your health care provider to provide personalized support to help you manage all aspects of your care. Please give us a call at 1-833-820-0842 at your earliest convenience. Have a great day!



Greeting Patients

From
Inbound Calls
Transferred
from IKCA

Hello *[Patient Name]*, how are you today?
I see you are calling to *[examples – sign consents, schedule CHE, complete PAM]*.
I am pleased to help you from here on.

Making
Outbound Calls

Hello, my name is *[CC Name]* and I'm calling on a recorded line from
DaVita Integrated Kidney Care, also known as DaVita IKC.
Is *[Patient Full Name]* available?



Asking for Permission to Proceed

Last Step
Before
Beginning
Onboarding

How are you today?

[Nephrologist Name/Practice Name] wanted me to reach out to you to introduce a new benefit that's now available to you as a Medicare member. This benefit does not affect your Medicare coverage - that hasn't changed. I can give you a quick recap of the benefits to see if you have any questions. Is now a good time to talk?





Example: Resistant Patient

ROLE PLAY

©2022 DaVita Inc. Proprietary and confidential. For internal use only.



Scenario: Very Resistant Patient

- **CC:** Hello, my name is <CC Name> and I'm calling on a recorded line from DaVita Integrated Kidney Care, also known as DaVita IKC. Is [PATIENT FULL NAME] available?
- **Patient:** Yes, this is she.
- **CC:** Thanks. How are you today?
- **Patient:** Doing well thank you.
- **CC:** [nephrologist name/practice name] wanted me to reach out to you to introduce a new benefit that's now available to you as a Medicare member. This benefit does not affect your Medicare coverage – that hasn't changed. I can give you a quick recap of the benefit to see if you have any questions. Would not be a good time to talk?

©2022 DaVita Inc. Proprietary and confidential. For internal use only.



Scenario: Very Resistant Patient

- Patient: Actually this isn't a good time for me. I have my family here and we are preparing lunch.
- CC: Okay– that is totally understandable, what would be a better time for me to contact you?
- Patient: No, I just really don't have time to do this. I take care of my grandkids and there is just no time.
- CC: Wow, taking care of your grandkids must bring you so much joy! If something changes and you feel like you are able to make time for this, I am here to support you. It is your choice to start the process, or stop if it doesn't feel like it's working for you. (supporting the patient's autonomy and choice)

Scenario: Very Resistant Patient

- Patient: Yes, these children bring me lots of smiles, but also make me very tired! Thank you for calling me about this new program.
- CC: If you are open to it, I would love to try and connect again? Maybe even hear more about your grandchildren!
- Possibility #1- Patient: Yes, that would be ok. Their mother usually picks them up at 4pm.
- Possibility #2- Patient: Maybe. Like I said, I am very busy and don't have a lot of time to talk.



Example: Ambivalent Patient

ROLE PLAY

©2022 DaVita Inc. Proprietary and confidential. For internal use only.



Scenario: Ambivalent Patient

- **CC:** Hello, my name is <CC Name> and I'm calling on a recorded line from DaVita Integrated Kidney Care, also known as DaVita IKC. Is [PATIENT FULL NAME] available?
- **Patient:** Yes, this is she.
- **CC:** Thanks. How are you today?
- **Patient:** Doing well thank you.
- **CC:** [nephrologist name/practice name] wanted me to reach out to you to introduce a new benefit that's now available to you as a Medicare member. This benefit does not affect your Medicare coverage – that hasn't changed. I can give you a quick recap of the benefit to see if you have any questions. Would not be a good time to talk?

Scenario: Ambivalent Patient

- Patient: Actually now isn't a good time.
- CC: Okay– that is totally understandable, what would be a better time for me to contact you?
- Patient: I don't know. I just don't think I need a new benefit right now.
- CC: Yes, that makes sense and I can see why you might think that. Would it be ok if I asked quickly about any current challenges you are having with managing your health?
- Patient: Well, actually, I have been struggling with my blood sugars recently. I actually ended up in the hospital for a low blood sugar a few weeks ago.

Scenario: Ambivalent Patient

- CC: Oh no, that must have been so scary.
- Patient: Yes it was...I have been so busy lately, it has been hard to make my diabetes a priority.
- CC: It sounds like you live a very fulfilled, busy life and you would love to make your health a focus.
- Patient: Yes. It would probably be easier to manage my Diabetes if I had some help.
- CC: Would it be ok if I shared some benefits of enrolling in this new benefit? It is totally your choice.

Scenario: Ambivalent Patient

- Patient: Sure that would be fine.
- CC: With this new program, you would have a dedicated care team that would work with you and your nephrologist to manage all aspects of your care. They would reach out to you regularly and help you with coordinating appointments and monitoring your labs and medications.
- Patient: Really? All of that if I just enroll in this program?
- CC: Yes. You may have noticed that we sent you some consent forms in a Welcome Packet.

Call Back Scheduling

Give Options

We'll only need a few minutes to talk about the program. What day and time
<desired call back time frame> would work best for you?
(Schedule time with patient and create reminder in Cerner)

Reminder

Thank you so much for your time – I'll be calling you on <day/time scheduled>.
You should have received a welcome packet in the mail (or will be receiving if
before 4/26/22). When you have a few moments, please take a look through
the materials before our next call.
I look forward to speaking with you then. Have a great day.

Contact Info

Do you have a paper and pen handy so you can take down our information?
(Patient Confirms) Our number is 1-833-820-0842. Have a great day. (End Call)



Overview/Intro

Introducing the program

[Nephrologist Name/Practice Name] is working with us to bring you personalized kidney care services. We work with your doctor and your care team to help protect your kidney health and give you a better quality of life. I will be your care coordinator through the onboarding process. We are calling to give you services beyond your doctor's office. You are a part of this program since you have been regularly seen by your Nephrologist, [Nephrologist Name].



PAM Script

Introducing the PAM

The next step is to complete the Patient Activation Measure, called PAM. This will give us and your nephrologist insight and guidance to establish individual goals and activities that are realistic and achievable for you. Do you have 5 minutes to complete?

Patient willing to proceed

Great! Your Care Team is dedicated to making sure their patients receive the best care possible. I am going to read 13 statements to respond to. There are no right or wrong answers so it's important to be truthful. Many people find that they do not agree with all of the statements, this is normal. Your answers are completely confidential, have no bearing on your coverage. Let's get started. For each statement I read please tell me whether you disagree strongly, disagree, agree, agree strongly, or feel that the statement does not apply to you. *(Proceed to completing the PAM survey in Flourish)*



Unable to Complete PAM on the Phone

Doesn't want to
complete over
the phone

That is totally understandable. If now isn't a good time, another option would be to fill out the paper PAM that is included in your welcome packet. Would it be helpful if we went through those papers together? I am happy to help you find the correct ones that will need to be completed and mailed in.

Willing to
complete
paper PAM

Great! You'll find the PAM and instructions in your welcome packet. Please read the instructions and complete all of the responses to the PAM. I'll keep an eye out for them. If I don't get them in the next week, I'll give you a call.
(Schedule call back reminder in Cerner)



Follow-Up PAM scheduling – Activation levels 3 or lower

Scheduling

Based off some of the responses, and per your insurance, we will want to schedule a follow-up PAM in 6 months. This is important because it will help us determine if the program is successfully assisting you to best understand all aspects of your health. *(CC pick a date at least 6 months from today's date, but before end of that month)* Does *[date and time selected]* work for you?

Response

(If Yes) – Great! We will call you on [scheduled date and time] to complete your follow-up PAM.

(If No) – No Problem. What date works better for you? (Schedule at least 6 months – no later than the end of that month). Great! We will call you on [scheduled date and time] to complete your follow-up PAM.

(If patient refuses to schedule follow up) – No Problem!



Reference to Welcome Packets

After Completing
the PAM

We sent everyone who is part of this program some welcome materials.
Did you receive the welcome packet in the mail?

Did patient
return forms?

Great! You probably noticed that we also sent along some consent forms in your Welcome packet too. Because [Nephrologist Name/Practice Name] and DaVita ILC value your privacy and communication preference, we do this for all of our patients who are already part of our program. It helps us know how we can best speak to your doctors and gather your health information. Have you sent your consent forms back to us yet?

Yes or No

(Yes – Forms Sent) Fantastic (confirm if uploaded in Cerner)
(No – Forms Not Sent) That's ok. I'm glad you hung onto them.
I'll go over those in a minute and make everything clear.



Consents – Intro to Digital Consents

No Consents On File

Looks like I don't have your consents on file. Would you like to complete your consent today digitally? I will explain each form, document your selections, and send the pre-filled forms via email or text for your signature.

Response

(If Yes) – Great, we have a few consent forms to fill out together today that are part of your Welcome Packet. (go to Vynca)
(If No) – *(Patient refuses/cannot sign consents digitally)* That's ok. This is the reason why we ask, since everyone has a different preference on how they want to be contacted and worked with in DaVita IKC.

Intro

I'm going to take a moment to walk you through the forms so they are prepared for you to sign when I send the link to the signature form. If you have questions or would like to understand these documents more you will be able to review them in full prior to signature.



Consents – Getting Digital Consents Script

Non Minnesota

The first form allows us to receive your health records from your other providers. Having access to your health records helps us provide comprehensive care services. The health records we receive are protected by federal privacy law and IKC is fully compliant with such laws.

Do I have your permission to receive health records from your providers for the purposes of your care with IKC?

Similar to above + additional questions such as:

This form also allows you to restrict our ability to share certain sensitive information regarding mental health, HIV/AIDS, alcohol, drug or other substance abuse, and sickle cell anemia.

Minnesota

Unless you have concerns about sharing this information I will leave this section blank. You may change this selection at any time by speaking with your care team. ✨

Consents – Getting Digital Consents Script

HIE

The next form is our digital records sharing consent which allows us to utilize and access digital health records from your other providers that are stored in shared electronic databases. If you opt-in we will use the information available in the electronic database, as well as share your information via the electronic database with your other providers, so we can provide you more comprehensive care. You can change this selection at any time by speaking with your care team. You can also find information about how to opt-out in our Notice of Privacy Practices included in your program welcome packet.

Would you like to opt-in?



Consents – Getting Digital Consents Script

Digital Communications

We only use digital communications when we have your permission to do so.
Would you like to provide your permission to utilize email for communications?

If Yes – Collect email and read back to verify

If No – Okay, we may still send you emails from time to time if we have
received your consent to do so through other means.

We will not leave detailed voicemails unless you provide us permission to do
so. Would you like to provide us permission to leave detailed voicemails at a
specified phone number?

If Yes – Collect phone number and read back to verify



Consents – Getting Digital Consents Script

Summary Consent Page

You will see a summary of the consent selections we just walked through. Please review to ensure I've documented your selections correctly. By signing this summary page, you are agreeing to the terms in the attached documents. You may scroll up to view them if you'd like.



Paper Consent Option

Not able/willing
to sign digital
consents

In your Welcome Packet, there will be a self-addressed stamped envelope to help you get it all back to us easily.

Do you have your Welcome packet available to get those signed and mailed in today?

Response

(If Yes) – Great! How soon can you get them in the mail? *(Patient Responds)* Fantastic. I'll keep an eye out for them. If I don't get them in the next week, I'll give you a call.

(If No) – How soon can you get them into us? *(Patient Responds)* Fantastic. I'll keep an eye out for them. If I don't get them in the next week, I'll give you a call.

(Doesn't want to complete) – We are happy to help you in any way we can. However, if you wish to complete your consents to get that extra level of support from your Care Team, please give us a call or tell your care team and we can resend them at any time.



Notice of Privacy Practice Temporary Process

When to use this?

- This is a temporary process for patients who were onboarded at the Nephrology Practice prior to the NPP being added to the consent packet. NPP must be uploaded before the CHE.
- This is only required for patients you are scheduling a CHE with who do not have a NPP uploaded in Cerner
 - If you are obtaining digital consents, this step is not necessary if patient signs consents
 - Use the script below to notify the patient about the NPP
 - Upload a blank 8 page NPP to the patients chart (job aid will be provided)

Response

“We’ve sent you a copy of our Notice of Privacy Practices via mail. Our Notice of Privacy Practices details how IKC accesses, utilizes, and discloses your information in relation to the health care services we provide. We would appreciate your signature on the acknowledgment form included at the end of the notice. This states that you have received a copy from us in relation to the services provided by IKC. You can sign and return to us using the return address included. If you would like further detail about these practices, you can find more information in the Notice of Privacy Practices themselves.”



CHE Scheduling

Nurse Practitioner Available to Schedule CHE

Okay, we're almost done. An important part of the *[Comprehensive Kidney Care Program]* is a Comprehensive Health Evaluation. This is a visit with a nurse practitioner that will be done via a video call from the comfort of your home. On this call the nurse will ask you several in-depth questions about your overall health, not just your kidneys. The questions will cover your past and present medical history. The nurse will also speak with you about any medications or supplements you may be taking. They will also ask about any medical conditions seen in the records we received from your nephrologist's office.

This visit will help DaVita IKC work with all of your doctors and other members of your care team to give you a better quality of care. The visit will take about one hour. I'm going to list some available times for your health evaluation, let me know which one works best for you for the one hour visit. *(List Several Options Based on NP Availability)*



CHE Scheduling Continued

VSee

VSee Clinic is the telehealth platform we will be using for your video visit. You will receive a meeting confirmation with a link that will take you directly to your visit.

Do you prefer for confirmation and reminders to be sent via email, text message, or both? Please note that if you choose text message, your mobile provider's standard rates for sending and receiving text messages still apply. Can you please confirm your email address and phone number for the visit?

(Read the email and/or phone number back to the patient, and confirm the contact information is correct)



CHE Scheduling Continued

Care Partner?

Do you plan on having a care partner join the visit? (If No – Continue On)

Response

(If Yes) – Will they be with you in-person, or will be they be in a different location?
(confirm that the care partner is on the patient's Permission to Discuss Form)

(If they will be in a different location) – What is their email and/or phone number? I can send them a meeting invitation too.

(Read the email and/or phone number back to the patient, and confirm the contact information is correct. Then add care partner to invite when scheduling the visit in VSee)

Reminder

Thanks, a nurse practitioner will be calling you back on [Scheduled Date/Time] for your health evaluation. You will receive a reminder call a day or two before your visit. Do you have a pen and paper to write down your nurse practitioner's name? [Provide NP name]. If you have any questions or need to reschedule your visit, please contact us at 1-833-820-0842.



Insurance Verification

Secondary Insurance?

Let's check to see if we have the correct insurance information on file. We already have your Medicare information. Do you have any other health insurance, like supplemental or Medigap insurance?

Response

(If No secondary insurance) – Go to Wrap Up

(If Yes secondary insurance) – Great, let's verify that information.

What is the name of the health insurance?

What is the name that appears on the insurance card?

What is the member number or member ID on the card?

What is the effective date of the insurance plan?

On the back of the card, do you see an address where claims can be sent to?



Wrap Up

Ending the
onboarding call

Thank you again for talking with me today. It has been an absolute pleasure and welcome to the DaVita IKC family!

If you ever have any questions about DaVita IKC or need any information, please call me at [1-833-820-0842 between 9-5 M-F MST] *(Provide name and number of local care coordinator if available, and ask patient to save phone number)*

Have a great day.



Break Time

